

Meeting with your legislator

Effective advocacy is about relationships. Developing a relationship with the Senators and Assemblymembers who represent your school district or county office of education, and continuing to build upon those relationships is vital to your success as an advocate.

Equally important is building a relationship with legislative staff, both at the Capitol and in district offices. In an era of term limits, many staff members you will meet (especially those working at the Capitol in Sacramento) will be around long after legislators' terms expire.

Before your visit:

- » Meet with other board members, district staff and the public to discuss your ideas and be aware of community response and interest. Note opposing viewpoints and constituencies, and be prepared to respond to these concerns if raised by your legislators.
- » Call or write your legislator for an appointment. If you plan to see him/her in the Capitol office, call shortly before you leave to confirm the appointment. Occasionally, hearings or other meetings occur that demand their presence elsewhere at the time of your meeting. In such a situation, you may be able to meet with staff if your legislator is not available – meetings with staff remain extremely valuable!
- » Give your legislator an "issues packet" during your visit. The purpose of the packet is to provide a point of reference to focus discussion, and to reinforce some of the matters discussed after you have left. This packet can include issues being raised by CSBA (which Governmental Relations staff can provide), supplemented with local information and facts that reinforce the CSBA issues being raised.
- » Be sure to include names of contact people (and/or business cards) in your packet so the legislator or his/her staff can contact you for further information.
- » If you prepare such a packet before meeting with your legislators, your discussion is more likely to be focused on the issues you wish to discuss. The legislator will also see you as a valuable information source who may be relied upon in the future.

During your visit:

- » Introduce yourself to the staff greeting you in the reception area and hand the person your business card.
- » Introduce yourself again to your legislator or staff member, thank them for taking the time to meet with you, and be ready to give him or her your card (staff person are likely to hold onto cards collected in the reception area).
- » **Ask how much time you have** and be sure to honor that time.

- » Cover the topics succinctly and allow time for your legislator to ask questions. Again, be mindful of the time, especially when that time frame is shorter, and cover the most important topics first. You may find that legislators talk about something unrelated like a local event you attended together. Do not expect there will be additional time granted if you engage in a lot of small talk. Instead, steer the conversation back to the main issues.
- » Spend more time on things **you agree with** than things you don't. Thank your legislators for doing the things they are doing that you agree with.
- » **Don't be afraid of what you *don't* know.** If you do not know the answer to a question, it is much better to say "I don't know the answer to that" than to provide information that may be wrong. Also be sure to tell your legislator you will follow up with them or their staff once you get the answer.
- » **Oppose the position, *not* the legislator!** If there is disagreement on the position or opinion being shared, note the difference, but do not argue.
- » **Think about your long term relationship** with your legislator and his or her staff. It is better to disagree in an agreeable way because you do not know when you are going to be back asking for help on another issue. Even if your legislator is about to be termed out of office, you never know where he or she (or the staff) will be in a few months or years.
- » **Enjoy your time!** You are an elected official just like your legislators and you share constituents. You are sharing information about CSBA's positions and how those positions impact your school district or county, and no one knows that better than you.
- » Close the meeting by thanking your legislator and their staff for their time and affirm when you will be getting back with any information promised during the meeting. Ask where to send the information.

After your visit:

- » Within a few days of the visit, send a brief thank you letter to your legislator reiterating the main issues discussed and summarize the outcome of the meeting.
- » Follow up on any commitments made during the meeting, such as providing additional information.
- » Whenever possible, please send copies of follow up correspondence to CSBA's Governmental Relations department at govrel@csba.org, so that GR can be aware of which legislators you have met with, issues discussed, agreements reached, etc.